

Driving Reasons: Revenue Productivity, Cost Saving Safety Str. Alliance Security Compliance Community Other:

Adverse Effects of the Status Quo

Goal Validity Tests: Clear Terminology Interests Validated Hidden-Motive Scan Values/Ethics Scan Stakeholder-Perception Scan

Priority/Weight: A: Vital/Essential/Must B: Important/Should C: Nice-to-have D: Safety, Security E: Compliance

Value Chain → Numbers 1 to 9 Indicate Work Sequence Planning Groundwork ↓	Mission/Ultimate Purpose (Why?): 1. Vision of the Future	Objectives Goals (Expressed in Benefits/Targets): 2. Portfolio of Goals	Products/Services (by Priority), Deliverables or Output Mix: 3. Strategy Grid	Resources, Allies, Information, Technology, Intelligence, Inputs: 4. Work Breakdown
	"The Grey Areas" (Assumptions & Surprise Events) List Here the Conditions Beyond the Control of this Negotiating Party. These are the Basis for Risk Identification and Mitigation (See Overleaf).	About Market & Client (Current & Emerging Mutations, Constraints and Opportunities): 9. Governance	About Product/Service Operating Environment: 8. Accountability	About Work, Processes & Management: 7. Quality, Time, Cost
Performance Management System Value Indicators & Performance Benchmarks Performance Targets for Comparable Quality, Quantity, Time, Location & Environmental Conditions List the Benchmarks Considered Instrumental to Success by each Key Stakeholder. Cross Off Irrelevant Indicators.	Impact on Mission & Environment Talent Retention, Innovation, Financial (ROA, ROI, ROE, EBITDA - Capital Exp., Liquidity, Leverage & Activity), Market Position, Essence (Long Term Competitive Advantage), Short & Long-Term Impacts on Ecosystems, Security, Health, Equity (Diversity, Age, Gender, First Nations, Minorities), Jobs, Global Solidarity, Collateral Damage & Other Governance Indicators:	Goal-Completion Indicators Effectiveness or Efficacy, Concept-to-Cash Performance, Ancillary Costs/Benefits, Life-Cycle Values & Duration of Customers and Orders, Client Ratios (New, Repeat & Lost Clients Versus Competition), Impact on Other Plans (Equilibrium, Learning Lessons, Cross-Selling & New Leads, Fiscal Goals). Other Result-Based Indicators at the goal Level:	Product, Task & Resource Management Competitive Benchmarks (Utility, Performance Speed, Power, Size, Weight, Delivery Time, Endurance, Esthetics, Simplicity, Price, Location, Accessibility, Support, Upgrading, Renewal, Maintenance, Safety, Security, Risks, Error Rate, Norms Used, Eco-Quality & Brand Image) Efficiency, Productivity, Progress Control Ratios (Ally & Team Synergy, Production Time, Cost, Cash Flow, Earned Value, Return on Management Time, Workload & Capacity Utilization):	Resource Mobilization Indicators Economy (Resource Cost versus Norms), Core Competencies, Team Skills, Character (Integrity, Reliability, Stability), Culture (Creativity, Initiative, Commitment, Entrepreneurship, Motivation, Team Spirit):
	Evaluation Plan for Above Benchmarks What Would Be Required for Reporting Progress and Final Impact? Who Should Do It? Value Transparency & Independent Reviews			



Best Alternative to the Project or Policy: _____

Risk Management Scenario:

Assumptions/Grey Areas <i>Potential Sources of Risks</i>	Initial Risk (Hazard & Probability) <i>Delivery Delays, Veto, Role Conflicts</i>	Plan A: Risk-Mitigation Strategy <i>to Reduce Initial Risks to a Manageable Level</i>	Plan B for Residual-Risks <i>Contingencies to Address Collateral damage</i>
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Principled-Intelligence Collection & Analysis System (to Scan for New Risks, Monitor Existing Risks & Update Project Plans):

